

# Global and China Automotive Thermal System Industry Report, 2011-2012

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## Abstracts

Global and China Automotive Thermal System Industry Report, 2011-2012 highlights the followings:

Introduction to automotive thermal system

Global and Chinese automotive market

Automotive thermal system market and industry in China and beyond

14 major automotive thermal system companies

Automotive thermal system mainly consists of four parts, namely, compressor, HVAC, powertrain cooling and fluid transport. The former three ones serve as the major components and comprise 85% of the entire automotive thermal system value.

The compressor falls into four categories, including pure electric compressor, variable swashplate compressor, rotary suction swashplate compressor and fixed scroll compressor.

HVAC, which can be seen on the dashboard, features small size, less noise and high efficiency. It mainly includes air filter, blower fan, evaporator and heater core.

Powertrain cooling system covers radiator, condenser, charge air cooler and integral oil cooler.

The global market size of automotive thermal system approximates USD36 billion in 2012. Since the automotive thermal system is quite mature, its market size usually changes with the automotive output.

The compressor is a high-tech component in the automotive thermal system, and most of the technologies for global automotive thermal system compressor are contributed by Japan. Japan-based Toyota Industries and Sanden are the world's largest manufacturers of automotive air conditioning compressor, and Toyota Industries makes up over 30% market share. Chinese enterprises principally focus on aftermarket, and China thus becomes the biggest producer of automotive air conditioning compressor for maintenance, featuring large output, low unit price and meager profit. A compressor made by Toyota Industries is priced at around USD120.6 on average, while one compressor made by Aotecar, the largest producer of automotive air conditioning compressor in China, was averagely sold at USD63 in 2011.

Valeo derives automotive air conditioning technology from Zexel, a Japanese company acquired by Valeo in 2003. And German Behr cooperates with Sanden to make up for its disadvantage in compressor field.

Visteon, a controlling company of Halla, relies on Halla and secures more than 60% of automotive thermal system orders from Hyundai and Ford. Denso, a former subsidiary of Toyota, not only wins over 80% of automotive thermal system orders from Toyota, but obtains the automotive thermal system business orders from GM, Chrysler, Honda, Suzuki and Mazda, and ascends to the No. 1 position worldwide.

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